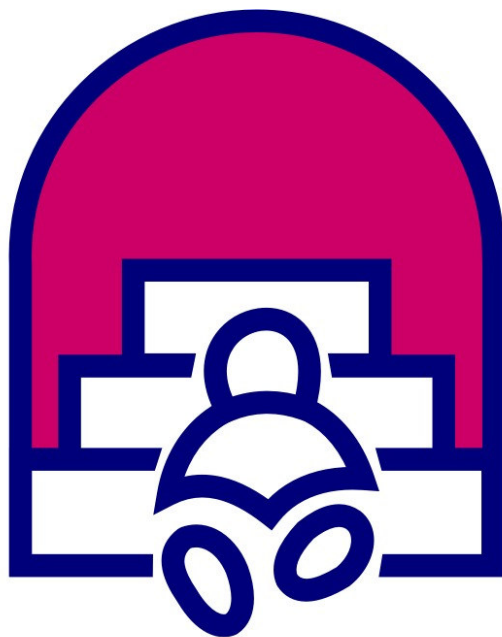


Indiana First Steps Quick Reference Guide

Provider Account Management



First Steps

Version 1.0 February 2009

www.infirststeps.com

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Overview






Welcome to the Indiana First Steps Quick Reference Guide. The purpose of this manual is to provide you with a quick reference guide that will help you quickly learn how to use the major functions of the Indiana First Steps web application.

This manual is a trimmed-down version of the Indiana First Steps Reference Manual, and was designed to step you through, from the first page to the last, many of the major tasks that can be performed in the Indiana First Steps web application. The instructions in this manual are designed from beginning to end.

As you can see, this manual is an excellent resource for quickly gaining an understanding of the application. The manual is divided into a few distinct areas. Take a minute to look at the Table of Contents and flip through the manual to familiarize yourself with the information it holds so that the next time you need a piece of information quickly, you'll know where to find it.

Getting Started

Within the help system, navigation buttons are displayed in the panel along the top of the web page. The online Help features may be accessed on the **Help** pull-down menu by selecting **Online Help** and then **Provider**. The following list describes each of the navigation buttons:

- Click the  **Contents** button to access the help system's table of contents.
- Click the  **Index** button to access the help system's index.
- Click the  **Search** button to access the help system's search function.
- Click the  **Glossary** button to access the help system's glossary of terms.
- Click the  **How Do I** button display a list of all How Do I topics within the help system.

The Contents, Index, Search, and Glossary functions are displayed in a pane on the left-hand side of the help system web page. The How Do I List is the only exception--it is displayed in this pane on the right-hand side of the web page.




To navigate to a previously displayed help topic click the web browser's **Back** button. For more information on navigating web pages, refer to your web browser's help file.

To print the currently displayed help topic, click the web browser's **Print** button. For more information on printing web pages, refer to your browser's help file.


Finding a Help Topic

Use these steps to find a help topic quickly and easily within the help system. There are four unique ways of locating a help topic. Use the method that you find most useful.



Complete the following steps to find a help topic using the table of contents:

1. Click the  **Contents** button to display the help system's table of contents panel on the left-hand side of the web page.
2. Browse through the help topics, displayed by category.
3. Click a book  to display the help topics it contains.
4. Click a page  to display a selected help topic.


Complete the following steps to find a help topic using the index:



1. Click the  **Index** button to display the help system's index panel on the left-hand side of the web page.
2. Browse through the keywords, listed alphabetically. **OR** Type a keyword or phrase in the text box to highlight a specific help topic.
3. Click a keyword in the index to display the help topic.

Complete the following steps to find a help topic using the search:

1. Click the  **Search** button to display the help system's search panel on the left-hand side of the web page.
2. Type a keyword or phrase in the text box.
3. Click the  button to begin the search.
4. Browse through the list of returned topics, sorted alphabetically.
5. Click a topic in the list to display a selected help topic.


Complete the following steps to find a How Do I help topic using the How Do I List:

1. Click the  **How Do I** button to display the help system's *How Do I List* on this side of the web page.
2. Browse through the list of topics, displayed alphabetically.
3. Click a topic in the list to display the selected help topic.

 **Note:** When you have found the help topic you were looking for using one of the methods listed above, you can click on the  button to hide the left-hand panel. This is displayed if using Microsoft Internet Explorer. Closing this frame is not allowed in Netscape.

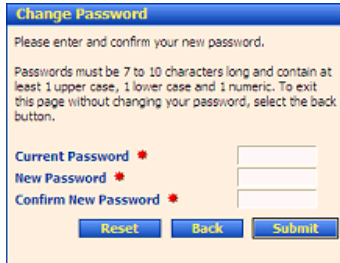
Changing User Password Information

Use these instructions to change your user password information.

 **Note:** Passwords must be 7 to 10 characters long and must contain at least 1 upper case character, 1 lower case character, and 1 numeric character.

Complete the following steps to finish these instructions:

1. On the **User Options** pull-down menu, select the **Change Password** menu option. The [Change Password](#) page displays.



The image shows a web form titled "Change Password". It contains the following text: "Please enter and confirm your new password." and "Passwords must be 7 to 10 characters long and contain at least 1 upper case, 1 lower case and 1 numeric. To exit this page without changing your password, select the back button." Below this text are three input fields labeled "Current Password", "New Password", and "Confirm New Password", each with a red asterisk. At the bottom of the form are three buttons: "Reset", "Back", and "Submit".

2. Enter **Current Password**.
3. Enter your **New Password**.
4. Enter your new password again in **Confirm New Password**.
5. Click **Submit**.

Billing Entities

Entering or Updating Billing Entity Detail Information

Use these instructions to see how to enter or update detailed information about a billing entity.


Complete the following steps to finish these instructions:

1. On the **Provider Account Management** pull-down menu, select the **Billing Entity** menu option. The [Billing Entity Detail](#) page displays.

Billing Entity Name		EI Agency		Tax ID		000001447	
Status		Active		Legal Status		Agency	
Address		11111 Any Street		Phone		999-999-8888	
				Mobile			
				Phone2			
City		OVERLAND PARK		Phone3			
State/Zip		KS 66210		Fax		999-888-9999	
Email		Email@Covansys.Com		Contact		Contact Person	
EFT Status		Inactive					

Reset Back Save

2. Enter or update the following information as necessary:
 - Phone
 - Mobile
 - Phone2
 - Phone3
 - Fax
 - Email
 - Contact
3. Click **Save**.

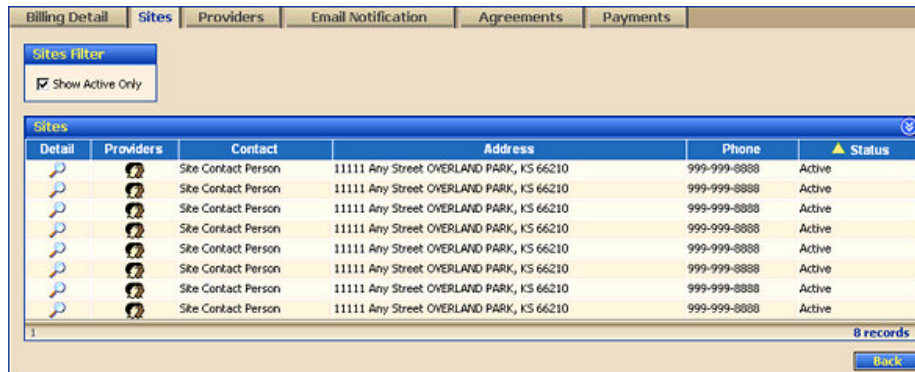
 **Tip:** The other information displayed on this page is read-only and cannot be changed.

Viewing a List of Billing Entity Sites

Use these instructions to view a list of sites associated with a specific billing entity.

On the Billing Entity Detail page, complete the following steps to finish these instructions:

1. Click the **Sites** tab. The [Billing Entity Sites](#) page displays.



Billing Detail Sites Providers Email Notification Agreements Payments					
Sites Filter					
<input checked="" type="checkbox"/> Show Active Only					
Sites					
Detail	Providers	Contact	Address	Phone	Status
		Site Contact Person	11111 Any Street OVERLAND PARK, KS 66210	999-999-8888	Active
		Site Contact Person	11111 Any Street OVERLAND PARK, KS 66210	999-999-8888	Active
		Site Contact Person	11111 Any Street OVERLAND PARK, KS 66210	999-999-8888	Active
		Site Contact Person	11111 Any Street OVERLAND PARK, KS 66210	999-999-8888	Active
		Site Contact Person	11111 Any Street OVERLAND PARK, KS 66210	999-999-8888	Active
		Site Contact Person	11111 Any Street OVERLAND PARK, KS 66210	999-999-8888	Active
		Site Contact Person	11111 Any Street OVERLAND PARK, KS 66210	999-999-8888	Active
		Site Contact Person	11111 Any Street OVERLAND PARK, KS 66210	999-999-8888	Active
1					8 records
Back					


2. View a list of the sites currently associated with the billing entity in the **Sites** table.


Tip: You can click the **Show Active Only** check box to view only the sites that are currently active.

Viewing and/or Updating a Billing Entity's Site Detail Information

Use these instructions to view and/or update site-specific detail information for a billing entity.

*On the **Billing Entity Sites** page, complete the following steps to finish these instructions:*

1. Click the magnifying glass  icon in the **Detail** column for a specific site. The [Site Detail](#) page displays.



Site Detail - Microsoft Internet Explorer provided by Covansys

Site Detail

Description Covansys Kansas Site
Status Active **Active Date** 12/31/1899

Address 11111 Any Street **Phone** 999-999-8888
Mobile
Phone2
Phone3
City OVERLAND PARK **Fax** 999-888-9999
State/Zip KS 66210
County Covansys

Email Email@Covansys.Com **Contact** Site Contact Person

One or More Provider Accounts may use this Site for

Payment Site No **Correspondence Site** No
Service Site Yes **Admin Only** No

Reset Close Save

 **Note:** To update the site's detail information, complete the remaining steps in these instructions.

2. Update the following information as necessary:
 - Phone
 - Mobile
 - Phone2
 - Phone3
 - Fax
 - Email
 - Contact
3. Click **Save**.

 **Tip:** The other information displayed on this page is read-only and cannot be changed.

Viewing a List of Billing Entity Providers by Site

Use these instructions to view all the providers who use a specific site for service, correspondence or payments.

On the Billing Entity Sites page, complete the following steps to finish these instructions:

1. Click the **Providers** icon next to a specific site in the **Sites** table. The [Billing Entity Provider List by Site](#) page displays.

Detail	Last Name	First Name	Account ID	Status
	Developmental/Educational Spec	Provider	000001447-0344	Active
	Developmental/Educational Spec	Provider	000001447-0404	Active


2. View a list of the providers currently associated with the site in the **Providers List** table.

Tip: You can click the **Show Active Only** check box to view only the providers that are currently active.

Viewing Detailed Information for a Billing Entity Provider by Site


Use these instructions to view detailed information about a billing entity provider by site.

On the [Billing Entity Provider List by Site](#) page, complete the following steps to finish these instructions:

1. Click the  icon in the **Detail** column for a specific provider. The [Provider Account Detail](#) page displays.

Acct. Detail		Sites		Provider Email Notification		Agreements	
Provider First Name	Provider	MI		Last Name	Developmental/Educational Spec		
Agency/Billing Name	EI Agency						
Provider Account ID	000001447-0344			Medicaid ID			
Account Active Date	09/13/2001	To		Prov. Enrollment Date	09/13/2001		
Degree				E-Signature	On File		
Prov. Acct. Address	11111 Any Street			Phone	999-999-8888		
				Mobile			
				Phone2			
				Phone3			
City	OVERLAND PARK			Fax	999-888-9999		
State/Zip	KS 66210						
Email	Email@Covansys.Com						
Specialty List				Back			

2. View the provider's detail information.

 **Tip:** The information displayed on this page is read-only and cannot be changed within the Provider Account Management system. Contact the CRO Provider Enrollment team to make changes.

Viewing a List of Billing Entity Providers

Use these instructions to view a list of all the provider accounts that use a specific billing entity's Tax ID number, and/or to view a list of all the provider accounts whose payments are paid to a specific billing entity.

*On the **Billing Entity Sites** page, complete the following steps to finish these instructions:*

1. Click the **Providers** tab. The [Billing Entity – Provider List](#) page displays.

Detail	▲ LastName	First Name	Account ID	Status
	Developmental/Educational Spec	Provider	000001447-0344	Active
	Developmental/Educational Spec	Provider	000001447-0404	Active
	Developmental/Educational Spec	Provider	000001447-0406	Active
	Developmental/Educational Spec	Provider	000001447-0410	Active
	Developmental/Educational Spec	Provider	000001447-0411	Active
	Developmental/Educational Spec	Provider	000001447-0269	Active
	Developmental/Educational Spec	Provider	000001447-0353	Active
	Developmental/Educational Spec	Provider	000001447-0446	Active


2. View a list of the providers currently associated with the site in the **Providers List** table.

Tip: You can click the **Show Active Only** check box to view only the providers that are currently active.

Viewing Detailed Information for a Billing Entity Provider

Use these instructions to view detailed information about a billing entity provider.

On the Billing Entity – Provider List page, complete the following steps to finish these instructions:

1. Click the  icon in the **Detail** column for a specific provider. The [Provider Account Detail](#) page displays.

Acct. Detail		Sites		Provider Email Notification		Agreements	
Provider First Name	Provider	MI		Last Name	Developmental/Educational Spec		
Agency/Billing Name	EI Agency						
Provider Account ID	000001447-0344			Medicaid ID			
Account Active Date	09/13/2001	To		Prov. Enrollment Date	09/13/2001		
Degree				E-Signature	On File		
Prov. Acct. Address	11111 Any Street			Phone	999-999-8888		
				Mobile			
				Phone2			
City	OVERLAND PARK			Phone3			
State/Zip	KS 66210			Fax	999-888-9999		
Email	Email@Covansys.Com						
Specialty List				Back			

2. View the provider's detail information.

 **Tip:** The information displayed on this page is read-only and cannot be changed.

Viewing and/or Updating a Billing Entity's Email Notifications

Use these instructions to view and/or update a billing entity's email notification triggers.

Note: Email notifications are sent to the email address listed on the [Billing Entity Detail](#) page. If an email notification is selected and a corresponding email address does not exist, an email notification will not be sent.

*On the **Billing Entity – Provider List** page, complete the following steps to finish these instructions:*

1. Click the **Email Notification** tab. The [Billing Entity Email Notification](#) page displays.



2. Update the following check box selections as necessary:
 - *Contact Information is updated for Billing or Site* > By selecting this notification, an e-mail will be sent to the e-mail address on file when a change has been made to the contact information.
 - *278-Authorization File is ready for Agency Providers* > By selecting this notification, an e-mail will be sent to the e-mail address on file when a 278 Authorization File is generated. This only applies to providers who have elected EDI/batch billing.
 - *New Agreement Attestation is Required* > By selecting this notification, an e-mail will be sent to the e-mail address on file when the provider has a new agreement to attest.
 - *835-Remittance Advice File Available For Download* > By selecting this notification, an e-mail will be sent to the e-mail address on file when a 835 Remittance Advice File is generated. This only applies to providers who have elected EDI/batch billing.
 - *Provider Account Inactivated* > By selecting this notification, an e-mail will be sent to the e-mail address on file when the provider's account is inactivated.
3. Click **Save**.

Viewing and/or Updating a Billing Entity's Payee Agreements

Use these instructions to view and/or update a billing entity's payee agreements.

On the Billing Entity Email Notification page, complete the following steps to finish these instructions:

1. Click the **Agreements** tab. The [Payee Agreements](#) page displays.

The screenshot shows a web application interface with a navigation bar at the top containing tabs: Billing Detail, Sites, Providers, Email Notification, Agreements (selected), and Payments. Below the navigation bar, there are two main sections. The first section is titled 'Current' and contains the text: 'Select the "I Agree" link on the line item to view and confirm for online agreements due.' The second section is titled 'Historical' and contains the text: 'Click on the View link for the line item to view the document previously confirmed.' At the bottom right of the Historical section, it says '0 records' and there is a 'Back' button.

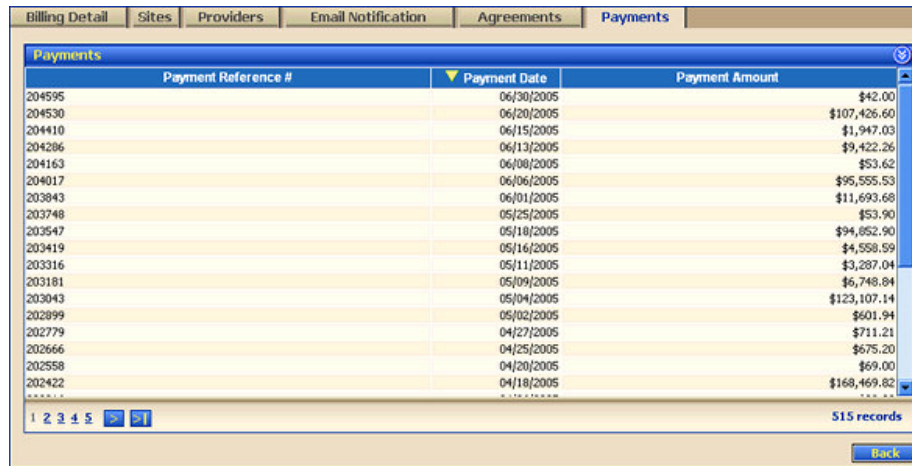
2. To update current payee agreements, select the **I Agree** link under **Current** to view and confirm a specific agreement.
3. To view detailed information about historical payee agreements, select the **PDF** link under **Historical**.

Viewing a List of Payments for a Billing Entity

Use these instructions to view a list of payments associated with a specific billing entity.

On the Payee Agreements page, complete the following steps to finish these instructions:

1. Click the **Payments** tab. The [Payments](#) page displays.




Payment Reference #	Payment Date	Payment Amount
204595	06/30/2005	\$42.00
204530	06/20/2005	\$107,426.60
204410	06/15/2005	\$1,947.03
204286	06/13/2005	\$9,422.26
204163	06/08/2005	\$53.62
204017	06/06/2005	\$95,555.53
203843	06/01/2005	\$11,693.68
203748	05/25/2005	\$53.90
203547	05/18/2005	\$94,852.90
203419	05/16/2005	\$4,558.59
203316	05/11/2005	\$3,287.04
203181	05/09/2005	\$6,748.84
203043	05/04/2005	\$123,107.14
202899	05/02/2005	\$601.94
202779	04/27/2005	\$711.21
202666	04/25/2005	\$675.20
202558	04/20/2005	\$69.00
202422	04/18/2005	\$168,469.82

2. View a list of the payments currently associated with the billing entity in the **Payments** table.

Provider Accounts

Entering or Updating Provider Account Detail Information

Use these instructions to see how to enter or update detailed information about a provider's account.

 **Tip:** A provider may have multiple provider accounts if the provider bills for services using multiple Tax ID numbers.

Complete the following steps to finish these instructions:

1. On the **Provider Account Management** pull-down menu, select the **Billing Entity** menu option. A sub-menu displays and then select **Billing Detail**.
2. Select the **Providers** tab and then the magnifying glass icon next to the provider's name. The [Provider Account Detail](#) page displays.




3. Enter or update the following information as necessary:
 - Phone
 - Mobile
 - Phone2
 - Phone3
 - Fax
 - Email
4. Click **Save**.

 **Tip:** The other information displayed on this page is read-only and cannot be changed.

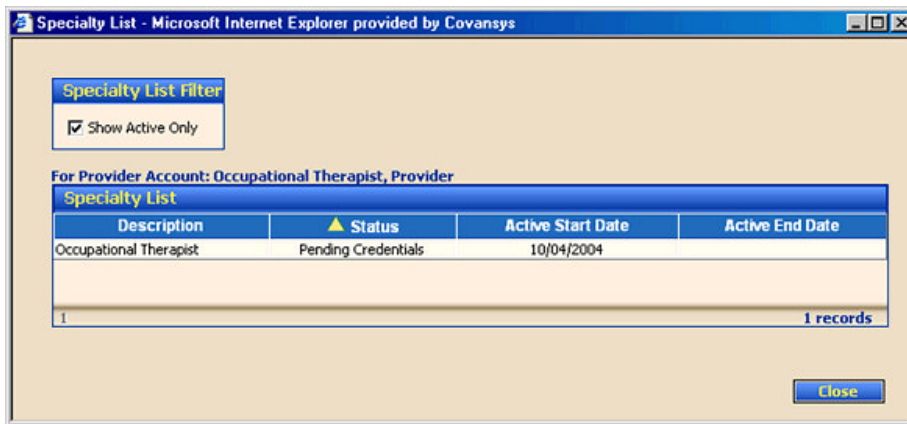
Viewing a Provider's Specialty List

Use these instructions to see how to view a list of a provider's specialties.

 **Note:** The provider will need to contact the CRO to make changes to the specialties associated with the provider account.

On the Provider Account Detail page, complete the following steps to finish these instructions:

1. Click **Specialty List** button below the account detail information. The [Specialty List](#) page displays.




Description	▲ Status	Active Start Date	Active End Date
Occupational Therapist	Pending Credentials	10/04/2004	

2. View the provider's specialties.

 **Tip:** The information displayed on this page is read-only and cannot be changed.

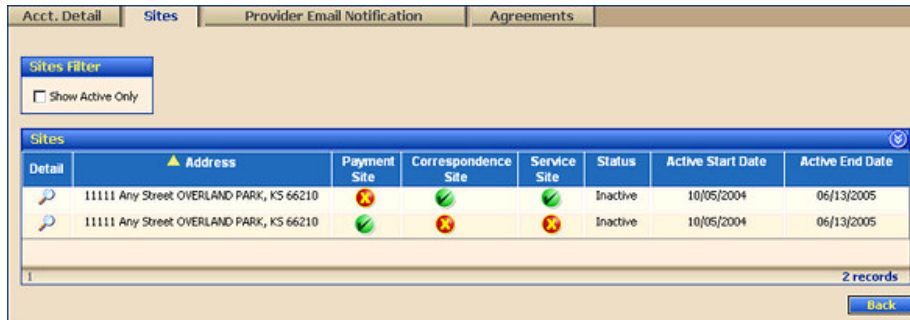
Viewing a List of Provider Account Sites









Use these instructions to view a list of sites associated with a specific provider account.

 **Note:** The provider will need to contact the CRO to make changes to the sites used by the provider account.

On the Provider Account Detail page, complete the following steps to finish these instructions:

1. Click the **Sites** tab. The [Provider Account – Site List](#) page displays.



Detail	Address	Payment Site	Correspondence Site	Service Site	Status	Active Start Date	Active End Date
	11111 Any Street OVERLAND PARK, KS 66210				Inactive	10/05/2004	06/13/2005
	11111 Any Street OVERLAND PARK, KS 66210				Inactive	10/05/2004	06/13/2005

2 records

[Back](#)


2. View a list of the sites currently associated with the provider account in the table.

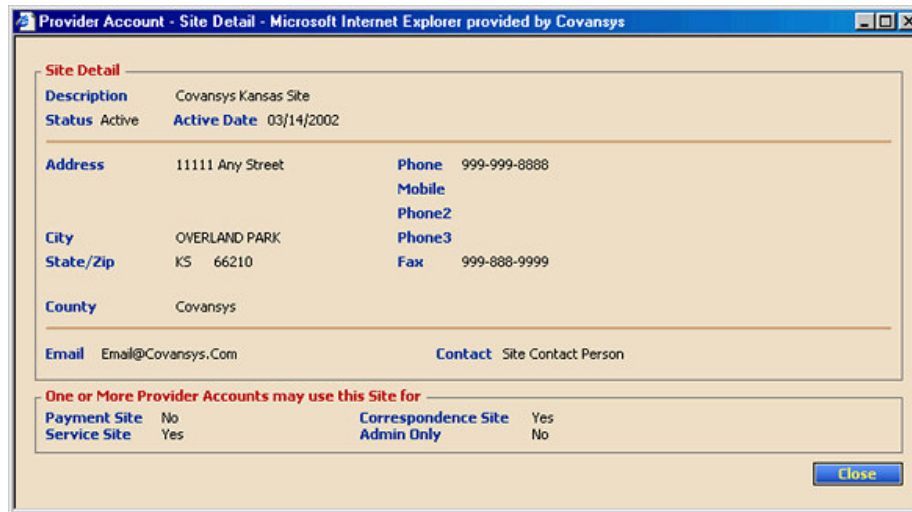
 **Tip:** The information displayed on this page is read-only and cannot be changed.

Viewing a Provider Account's Site Detail Information

Use these instructions to view detailed information about a specific site currently associated with a provider account.

On the Provider Account – Site List page, complete the following steps to finish these instructions:

1. Click the  icon in the **Detail** column for a specific site. The [Provider Account - Site Detail](#) page displays.



The screenshot shows a web browser window titled "Provider Account - Site Detail - Microsoft Internet Explorer provided by Covansys". The page content is as follows:


Site Detail	
Description	Covansys Kansas Site
Status	Active
Active Date	03/14/2002
<hr/>	
Address	11111 Any Street
City	OVERLAND PARK
State/Zip	KS 66210
County	Covansys
Phone	999-999-8888
Mobile	
Phone2	
Phone3	
Fax	999-888-9999
<hr/>	
Email	Email@Covansys.Com
Contact	Site Contact Person
<hr/>	
One or More Provider Accounts may use this Site for	
Payment Site	No
Service Site	Yes
Correspondence Site	Yes
Admin Only	No
<hr/>	
Close	

2. View the provider account's site detail information.

 **Tip:** The information displayed on this page is read-only and cannot be changed.

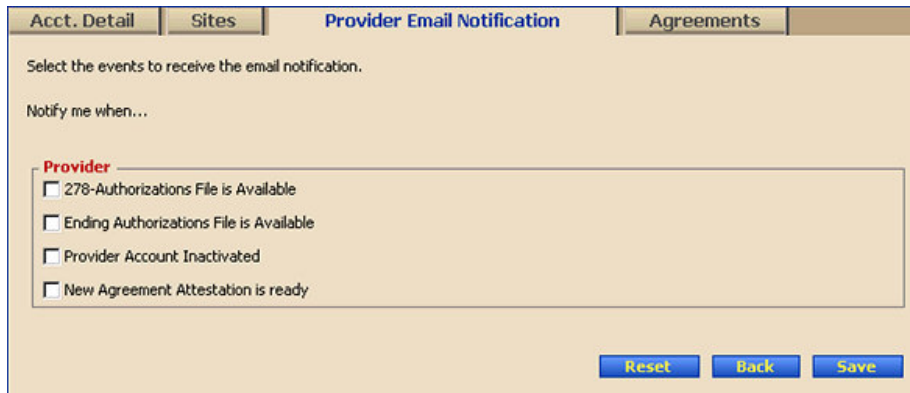
Viewing and/or Updating a Provider Account's Email Notifications

Use these instructions to view and/or update a provider account's email notification triggers.

 **Note:** Email notifications are sent to the email address listed on the [Provider Account Detail](#) page. If an email notification is selected and a corresponding email address does not exist, an email notification will not be sent.

On the Provider Account – Site List page, complete the following steps to finish these instructions:

1. Click the **Provider Email Notification** tab. The [Provider Email Notifications](#) page displays.



The screenshot shows a web interface with four tabs: 'Acct. Detail', 'Sites', 'Provider Email Notification' (which is selected and highlighted in blue), and 'Agreements'. Below the tabs, the text 'Select the events to receive the email notification.' is followed by 'Notify me when...'. A section titled 'Provider' contains four unchecked checkboxes: '278-Authorizations File is Available', 'Ending Authorizations File is Available', 'Provider Account Inactivated', and 'New Agreement Attestation is ready'. At the bottom right, there are three buttons: 'Reset', 'Back', and 'Save'.

2. Update the following check box selections as necessary:
 - 278-Authorization File is Available
 - Ending Authorizations File is Available
 - Provider Account Inactivated
 - New Agreement Attestation is ready
3. Click **Save**.

Viewing and/or Updating a Provider Account's Agreements

Use these instructions to view and/or update the agreements required between the provider and the CRO for the enrollment of the provider account.

On the Provider Email Notifications page, complete the following steps to finish these instructions:

1. Click the **Agreements** tab. The [Provider Account Agreements](#) page displays.

Title	Version	Document
Police Check	1	I Agree
Liability Insurance	1	I Agree

Title	Date Signed	Effective Date Range	Document
Liability Insurance (Paper)	12/06/2004	10/04/2004 - 10/04/2005	On File
Liability Insurance (Paper)	12/01/2004	10/04/2004 - 10/04/2005	On File
Police Check (Paper)	07/14/2004	10/04/2004 - 10/04/2005	On File
Liability Insurance (Paper)	12/06/2003	10/04/2003 - 10/04/2004	On File

4 records

[Back](#)

2. To update current payee agreements, select the **I Agree** link under **Current** to view and confirm a specific agreement. The [I Agree](#) page for provider accounts displays when clicked.

Police/Background Check Attestation

10-16-2004

The completion of the Police/Background Check Attestation web page certifies that the entity that I represent would/has successfully

I Have Read The Document And I Agree

[I Agree](#) [Close](#)

3. Click **I Agree**. The [Provider Account Agreements](#) page displays and the **Historical** table is refreshed to display the newly "agreed to" document.

Acct. Detail	Sites	Provider Email Notification	Agreements
Current			
Select the "I Agree" link on the line item to view and confirm for online agreements due.			
Title		Version	Document
Police Check		1	I Agree
Liability Insurance		1	I Agree
Historical			
Click on the View link for the line item to view the document previously confirmed.			
Title	Date Signed	Effective Date Range	Document
Liability Insurance (Paper)	12/06/2004	10/04/2004 - 10/04/2005	On File
Liability Insurance (Paper)	12/01/2004	10/04/2004 - 10/04/2005	On File
Police Check (Paper)	07/14/2004	10/04/2004 - 10/04/2005	On File
Liability Insurance (Paper)	12/06/2003	10/04/2003 - 10/04/2004	On File
1			4 records
Back			

- To view detailed information about historical payee agreements, select the **PDF** link under **Historical**.

Claims

Entering, Updating, and Checking an Online Claim

Use these instructions to enter, update, and check an online claim.

Note: The claims entry page is displayed by using a variety of methods. These instructions will guide you using all available methods. Therefore, depending on which method is used to access the claims entry page, some of the steps in these instructions may be optional.

Complete the following steps to finish these instructions:

1. On the **Provider Account Management** pull-down menu, select the **Provider Billing** menu option. A sub-menu displays.
2. Select the **Claim Entry** sub-menu option. The [Claim Entry \(Service tab\)](#) page displays.
3. If necessary, enter the full **Authorization Number** or search for an authorization. For more information, see [How Do I Search for an Authorization](#).



4. Select the **Enter Service Line** button to add the detail line items for this claim. The claim entry page (specific to the service line you are adding) displays.
5. Complete all of the required information on this page to enter a line for the claim. Fields marked with an asterisk (*) are required.

NOTE: Enter the total charges for the service; not per unit charge.



- Click **Add to Claim** to save your information.

The screenshot shows the 'Claim Detail' form. At the top, there are tabs for 'Service', 'Assistive Tech', and 'Transportation'. Below these, there are fields for 'Auth #' (A9876167919-8) and 'Patient Acct.'. The main section is a table with columns: Detail, Line, Date, Location Code, EI Code, CPT, ICD9, Units, Charges, and Delete. The table contains one row with the following data: Detail (magnifying glass icon), Line (1), Date (07/13/2005), Location Code (Home), EI Code (X6022), CPT (95851), ICD9 (001), Units (12), Charges (\$15.00), and Delete (trash icon). Below the table, it says '1 records'. At the bottom, there is a 'Claim Total Charges' of \$15.00 and an 'Enter Service Line' button. At the very bottom, there are buttons for 'Reset', 'Back', 'Check Claim', and 'Submit'.

Tip: All line items are displayed for the claim. The total dollar value of all of the line items on the claim is displayed in **Claim Total Charges** at the bottom of the page. A **Detail** icon is available for each line item. You can click the **Detail** icon to edit a specific line item. Or, you can click the **Delete** icon to remove a specific line item from the claim.

- Click the magnifying glass icon in the **Detail** column for a specific line item. The claim update page (specific to the service line you are updating) displays.
- Update any of the information on this page as necessary. Remember, fields marked with an asterisk (*) are required and cannot be left blank.

The screenshot shows the 'Claim - Service Line Item Information' form. It has a title bar that says 'Claim - Service Line Item Information - Microsoft Internet Explorer provided by Covansys'. The form contains the following fields: 'Service Line' (1), 'Service Date' (07/13/2005), 'Location Code' (Home), 'EI Code' (X6022), 'CPT' (95851), 'ICD9 Code' (001), 'Units' (12), and 'Charges \$' (15.00). There is a checkbox for 'Second Service for the Same Date'. A 'Unit Conversion' box on the right states: '1 Unit = 15 Minutes Unless Otherwise Indicated in the CPT Description'. At the bottom, there are buttons for 'Reset', 'Close', and 'Update Claim'.

- Click **Update Claim** to save your changes.

Tip: You can also click **Close** to exit the page without saving any changes, or click **Reset** to undo any changes made on the page and restore the previously saved information.

- Click **Check Claim** to perform the application's validation edits on the claim without submitting the claim. (You can still update the claim if necessary when checking a claim.)

Check Claim is complete. Please Submit the Claim for Payment.

Service:

Auth # A9876167919-8 Patient Acct.

Claim Detail											
Detail	Line	Date	Location Code	El Code	CPT	ICD9	Units	Charges	Disallowed	Denied	Delete
	1	07/13/2005	Home	X6022	95851	001	12	\$15.00	\$0.00	\$0.00	

1 records

Claim Total Charges \$15.00

Tip: After the system validation edits are complete, you are shown whether the claim will pass or fail when it is submitted. At this point the claim has not been saved to the database and may be corrected if necessary. Individual line items may still be added to the claim, updated on the claim, or deleted from the claim. The **Check Claim** button may be clicked multiple times to perform many checks on the claim until the claim is actually submitted.

11. Once the claim entry is complete and has been checked thoroughly, click **Submit** to save the claim to the database.

The New Claim Id is 050713-5006-10000

Service:

Auth # Patient Acct.

Claim Detail									

0 records

Claim Total Charges \$0.00

Note: A claim that has been submitted to the database may still be updated after submission by clicking the **Correct Claim** button on the [Claim Detail](#) page. However, once the claim status is **Paid**, the claim can no longer be corrected.

Entering a Service Line to a Claim

Use these instructions to enter a service line item to a claim.

On the Claim Entry (Service tab) page, complete the following steps to finish these instructions:

1. Enter an **Auth #** and press the **Enter** key on your keyboard. If necessary, you can click the **Search Authorizations** button to perform a search.
2. Click **Enter Service Line**. The [Claim – Service Line Item Information](#) page displays.

Claim - Service Line Item Information - Microsoft Internet Explorer provided by Covansys

Service Line: 1 Service Date: [Calendar Icon]

Location Code: [Dropdown] ☐ Second Service for the Same Date

EI Code: X6016 CPT: [Search Icon]

ICD9 Code: [Search Icon]

Units: [Text] Charges \$: [Text]

Unit Conversion
1 Unit = 15 Minutes Unless
Otherwise Indicated in the
CPT Description

Reset Close Add to Claim

3. Enter the **Service Date**. You can click the icon to select the date from a calendar.
4. Select a **Location Code** for the service line.
5. If applicable, select the **Second Service for the Same Date** check box.
6. View the **EI Code** for the authorization. This information is read-only and cannot be changed.
7. Enter the **CPT** code for the service line. You can click the icon to search for a specific CPT, then select a specific CPT in the **Select CPT** table.
8. Enter the **ICD9 Code** for the service line. You can click the icon to search for a specific ICD9, then select a specific ICD9 in the **Select ICD9 Code** table.
9. Enter the **Units**. 1 unit equals 15 minutes of service time.
10. Enter the **Charges \$**.
11. Click **Add to Claim**.

Entering an Assistive Tech Line to a Claim

Use these instructions to enter an Assistive Tech line item to a claim.

On the Claim Entry (Service tab) page, complete the following steps to finish these instructions:

1. Click the **Assistive Tech** tab. The [Claim Entry \(Assistive Tech tab\)](#) page displays.

2. Enter an **Auth #** and press the **Enter** key on your keyboard. If necessary, you can click the **Search Authorizations** button to perform a search.
3. Click **Enter Assistive Tech Line**. The [Claim – Assistive Tech Line Item Information](#) page displays.

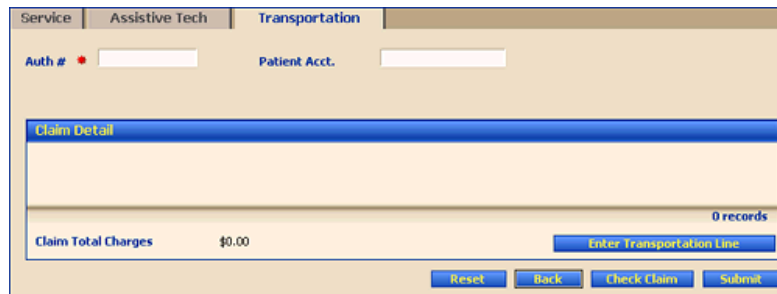
4. Enter the **Purchase Date**. You can click the icon to select the date from a calendar.
5. Select the **HCPCS Code** for the Assistive Tech line.
6. Enter the **Units**. 1 unit equals 1 item.
7. Enter the **Total Charges \$**.
8. Click **Add to Claim**.

Entering a Transportation Line to a Claim

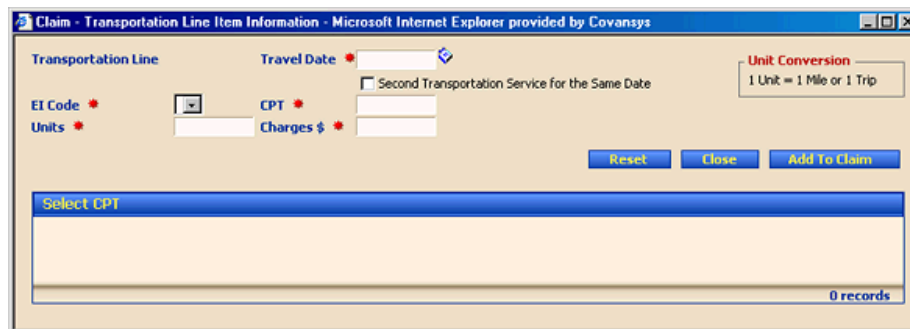
Use these instructions to enter a transportation line item to a claim.


On the Claim Entry (Assistive Tech tab) page, complete the following steps to finish these instructions:

1. Click the **Transportation** tab. The [Claim Entry \(Transportation tab\)](#) page displays.



2. Enter an **Auth #** and press the **Enter** key on your keyboard. If necessary, you can click the **Search Authorizations** button to perform a search.
3. Click **Enter Transportation Line**. The [Claim – Transportation Line Item Information](#) page displays.



4. Enter the **Travel Date**. You can click the  icon to select the date from a calendar.
5. If applicable, select the **Second Transportation Service for the Same Date** check box.
6. Select the **EI Code** for the transportation line.
7. Enter the **CPT** code for the transportation line.
8. Enter the **Units**. 1 unit equals 1 mile or 1 trip.
9. Enter the **Charges \$**.
10. In the **Select CPT** table, select a CPT to insert for the transportation line as necessary.
11. Click **Add to Claim**.

Searching for a Claim

Use these instructions to search for a claim that currently exists within the database.

Complete the following steps to finish these instructions:

1. On the **Provider Account Management** pull-down menu, select the **Provider Billing** menu option. A sub-menu displays.
2. Select the **Search** sub-menu option. A sub-menu displays.
3. Select the **Claims** sub-menu option. The [Search Claims](#) page displays.

The screenshot shows a web form titled "Search Criteria" with a blue header bar. The form is organized into two columns of search criteria, each with a radio button to its left. The criteria are as follows:

- Claim #**: A text input field.
- Authorization**: A text input field.
- Provider Account**: A text input field.
- Provider Name**: Two stacked text input fields for "Last Name" and "First Name".
- Child Id**: A text input field.
- Child Name**: Two stacked text input fields for "Last Name" and "First Name".
- Payment Reference Number**: A text input field.
- Date Range**: A dropdown menu for "Type" (currently set to "Submitted Date"), and two stacked text input fields for "Start Date" and "End Date".

At the bottom right of the form, there are two buttons: "Back" and "Search".

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4. Select the appropriate radio button and enter filter criteria in the following radio button fields as necessary to perform a search. Only one search criteria may be selected.
 - Claim #
 - Authorization #
 - Provider Acct
 - Provider Name
 - Last Name (Provider)
 - First Name (Provider)
 - Child Id
 - Child Name
 - Last Name (Child)
 - First Name (Child)
 - Check Number
 - Date Range
 - Type
 - Start Date
 - End Date
5. Click **Search** to perform a search based on the filter criteria entered. The [Claim List](#) page displays a list of claims that match the specified search criteria.


Search Filter								
<div>All Claims</div>								
Claim List								
Detail	History	Auth	▲ Claim #	Child Name	Child Id	DOB	Received Date	Provider
			050517-2100-10937	CARTER, Child	9876167919	09/20/2002	05/17/2005	Occupational Therapist, Provider
			050602-2100-10950	CARTER, Child	9876167919	09/20/2002	06/02/2005	Occupational Therapist, Provider
			050602-2100-10951	CARTER, Child	9876167919	09/20/2002	06/02/2005	Occupational Therapist, Provider
			050613-30-10045	CARTER, Child	9876167919	09/20/2002	05/02/2005	Occupational Therapist, Provider
			050613-30-10046	CARTER, Child	9876167919	09/20/2002	05/02/2005	Occupational Therapist, Provider
			050713-5006-10000	CARTER, Child	9876167919	09/20/2002	07/13/2005	Occupational Therapist, Provider
1								
6 records								
<div>PrintBack</div>								

Printing a List of Claims

Use these instructions to display a printer-friendly list of claims that can be printed on your printer.

On the Claim List page, complete the following steps to finish these instructions:


1. Click **Print**. A page containing a printer-friendly list of claims is displayed. Use your browser's print function to print the page as necessary.

 **Note:** Depending on your browser, the steps required to print a web page may differ. Please refer to your browser's online help system for the printing options that are specific to your browser.

Viewing the Details of a Claim from the Claim List

Use these instructions to display detailed information about a claim from the [Claim List](#) page.

On the Claim List page, complete the following steps to finish these instructions:

1. Click the  icon in the **Detail** column for a specific claim. The [Claim Detail](#) page displays.

Claim #	050517-2100-10937	Patient Acct.	
Auth #	A9876167919-8	Submitted Date	05/17/2005
Total Amount Billed	\$86.56	Adjustment Reason	None
Status	Paid		

Claim Line Detail												
Line	Service Date	Location Code	El Code	CPT	ICD9 Code	Units	Amount Billed	Disallowed	Denied	Reason	Previously Paid	Net
918	4/29/2005	Undetermined	X6022	97530		4	\$86.56	\$0.00	\$0.00	None	\$0.00	\$86.56

1 records

[Print](#) [Back](#)


2. View the claim's detail information.

Printing the Details of a Claim

Use these instructions to display a printer-friendly page that contains detailed claim information that can be printed on your printer.

On the Claim Detail page, complete the following steps to finish these instructions:

1. Click **Print**. A page containing a printer-friendly list of claims is displayed. Use your browser's print function to print the page as necessary.

 **Note:** Depending on your browser, the steps required to print a web page may differ. Please refer to your browser's online help system for the printing options that are specific to your browser.

Viewing the Details of an Authorization from the Claim List

Use these instructions to display detailed information about an authorization from the [Claim List](#) page.

On the Claim List page, complete the following steps to finish these instructions:

1. Click the **Auth** icon next to a specific claim in the **Claim List** table. The [Authorization Detail](#) page displays.

Authorization Number	A9676167919-8	Authorization Status	Active
Service Type	Occupational Therapy	Dates	03/29/2005 To 09/19/2005
Authorization Type	Service	Eff. Cancel Date	
Acct	000001447 -0480	Provider	Occupational Therapist, Provider
Print Date	04/03/2005	Service Coordinator	Service Coordinator, Provider
		Phone	999-999-8888

Authorization Line					
El Code	Description	No. of Occurrences	Frequency	Duration	CPT
X6022	Direct Child Treatment-Individual	1	Week	60	CPT

1 records

Print List Claim Claim Entry Back

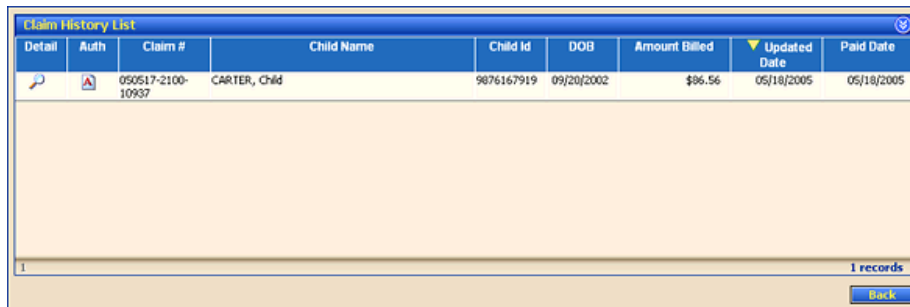
2. View the authorization's detail information.



Viewing the History of a Claim

Use these instructions to display a complete history of a claim.

On the Claim List page, complete the following steps to finish these instructions:

1. Click the **History** icon next to a specific claim in the **Claim List** table. The [Claim History List](#) page displays.



Detail	Auth	Claim #	Child Name	Child Id	DOB	Amount Billed	Updated Date	Paid Date
		050517-2100-10937	CARTER, Child	9876167919	09/20/2002	\$86.56	05/18/2005	05/18/2005

1 records


Back

2. View the claim's historical information.

Viewing the Details of a Claim from the Claim History List

Use these instructions to display detailed information about a claim from the [Claim History List](#) page.

On the Claim History List page, complete the following steps to finish these instructions:

1. Click the  icon in the **Detail** column for a specific claim. The [Claim Detail](#) page displays.

Claim #	050517-2100-10937	Patient Acct.	
Auth #	A9876167919-8	Submitted Date	05/17/2005
Total Amount Billed	\$86.56	Adjustment Reason	None
Status	Paid		

Line	Service Date	Location Code	El Code	CPT	ICD9 Code	Units	Amount Billed	Disallowed	Denied	Reason	Previously Paid	Net
918	4/29/2005	Undetermined	X6022	97530		4	\$86.56	\$0.00	\$0.00	None	\$0.00	\$86.56

1 records


[Print](#) [Back](#)

2. View the claim's detail information.

Viewing the Details of an Authorization from the Claim History List

Use these instructions to display detailed information about an authorization from the [Claim History List](#) page.

On the Claim History List page, complete the following steps to finish these instructions:

1. Click the  icon next to a specific claim in the **Claim History List** table. The [Authorization Detail](#) page displays.

Authorization Number	A9876167919-8	Authorization Status	Active
Service Type	Occupational Therapy	Dates	03/29/2005 To 09/19/2005
Authorization Type	Service	Eff. Cancel Date	
Acct	000001447 -0480	Provider	Occupational Therapist, Provider
Print Date	04/03/2005	Service Coordinator	Service Coordinator, Provider
		Phone	999-999-8888

Authorization Line					
El Code	Description	No. of Occurrences	Frequency	Duration	CPT
X6022	Direct Child Treatment-Individual	1	Week	60	CPT

1 records

Print List Claim Claim Entry Back

2. View the authorization's detail information.

Authorizations

Searching for an Authorization

Use these instructions to search for an authorization that currently exists within the database.

Complete the following steps to finish these instructions:

1. On the **Provider Account Management** pull-down menu, select the **Provider Billing** menu option. A sub-menu displays.
2. Select the **Search** sub-menu option. A sub-menu displays.
3. Select the **Authorizations** sub-menu option. The [Search Authorizations](#) page displays.

Search Criteria
To perform a search select a search option, enter the search criteria and then select the **Search** button.

☐ **Child Id**
Child Id

☐ **Child Name**
Last Name
First Name

☐ **Authorization**
Authorization #

☐ **Date Range**
Type
Start Date
End Date

☐ **Provider**
Last Name
First Name

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4. Select the appropriate radio button and enter filter criteria in the following fields as necessary to perform a search: Only one search criteria may be selected.
 - Claim #
 - Authorization #
 - Provider Acct
 - Provider Name
 - Last Name (Provider)
 - First Name (Provider)
 - Child Id
 - Child Name
 - Last Name (Child)
 - First Name (Child)
 - Check Number
 - Date Range
 - Type
 - Start Date
 - End Date
5. Click **Search** to perform a search based on the filter criteria entered. The [Authorization List](#) page displays a list of claims that match the specified search criteria.

Search Filter

☒ Show Active Only

Search Results

Detail	Auth Number	Start Date	End Date	Child Last Name	Child First Name	Child ID	DOB	Status	Provider
	A9876167919-0	03/29/2005	09/19/2005	CARTER	Child	9876167919	09/20/2002	Active	Occupational Therapist, Provider

1 records


Print Back

Printing a List of Authorizations

Use these instructions to display a printer-friendly list of authorizations that can be printed on your printer.

On the Authorization List page, complete the following steps to finish these instructions:

1. Click **Print**. A page containing a printer-friendly list of claims is displayed. Use your browser's print function to print the page as necessary.

 **Note:** Depending on your browser, the steps required to print a web page may differ. Please refer to your browser's online help system for the printing options that are specific to your browser.

Viewing the Details of a Claim from the Authorization List

Use these instructions to display detailed information about a claim from the [Authorization List](#) page.

On the Authorization List page, complete the following steps to finish these instructions:

1. Click the claim  icon in the **Detail** column for a specific claim. **The Claim Detail** page displays.

Claim #	050517-2100-10937	Patient Acct.	
Auth #	A9876167919-8	Submitted Date	05/17/2005
Total Amount Billed	\$86.56	Adjustment Reason	None
Status	Paid		

Claim Line Detail												
Line	Service Date	Location Code	El Code	CPT	ICD9 Code	Units	Amount Billed	Disallowed	Denied	Reason	Previously Paid	Net
918	4/29/2005	Undetermined	X6022	97530		4	\$86.56	\$0.00	\$0.00	None	\$0.00	\$86.56

1 records


[Print](#) [Back](#)

2. View the claim's detail information.

Viewing the Details of an Authorization from the Authorization List

Use these instructions to display detailed information about an authorization from the [Authorization List](#) page.

On the Authorization List page, complete the following steps to finish these instructions:

1. Click the  icon in the **Detail** column for a specific authorization. The [Authorization Detail](#) page displays.

Authorization Number	A9876167919-8	Authorization Status	Active
Service Type	Occupational Therapy	Dates	03/29/2005 To 09/19/2005
Authorization Type	Service	Eff. Cancel Date	
Acct	000001447 -0480	Provider	Occupational Therapist, Provider
Print Date	04/03/2005	Service Coordinator	Service Coordinator, Provider
		Phone	999-999-8888

Authorization Line					
El Code	Description	No. of Occurrences	Frequency	Duration	CPT
X6022	Direct Child Treatment-Individual	1	Week	60	CPT

1 records

Print List Claim Claim Entry Back


2. View the authorization's detail information.

Printing the Details of an Authorization

Use these instructions to display a printer-friendly page that contains detailed authorization information that can be printed on your printer.

On the Authorization Detail page, complete the following steps to finish these instructions:

1. Click **Print**. A page containing a printer-friendly list of claims is displayed. Use your browser's print function to print the page as necessary.

 **Note:** Depending on your browser, the steps required to print a web page may differ. Please refer to your browser's online help system for the printing options that are specific to your browser.

Viewing CPT Information for an Authorization

Use these instructions to view CPT information for a specific authorization.

On the Authorization Detail page, complete the following steps to finish these instructions:

1. Click the **CPT** link next to a specific authorization in the **Authorization Line** table. The [CPT](#) page displays.

CPT	CPT Description	Start Date	End Date
95851	Range of motion measurements and report (separate procedure); each extremity (excluding hand) or each trunk section (spine)	11/13/2003	12/30/9999
97504	Orthotic(s) fitting and training, upper extremity(ies), lower extremity(ies), and/or trunk, each 15 minutes	11/13/2003	12/30/9999
97520	Prosthetic training, upper and/or lower extremities, each 15 minutes	11/13/2003	12/30/9999
97530	Therapeutic activities, direct (one-on-one) patient contact by the provider (use of dynamic activities to improve functional performance), each 15 minutes	11/13/2003	12/30/9999

2. View the authorization's CPT information.